



OFFICE OF PUBLIC INSTRUCTION

PO BOX 202501
HELENA MT 59620-2501
www.opi.mt.gov
(406) 444-3095
(888) 231-9393
(406) 444-0169 (TTY)

Linda McCulloch
Superintendent

February 6, 2008

To: Authorized Representatives of IDEA Part B/Preschool Projects
Business Managers/Clerks

From: Marilyn Pearson
Interim IDEA Program Manager

Re: IDEA Consolidated E-Grants
Carryover Funds and Budget Amendment Procedures

The FY '07 IDEA Part B and Preschool Carryover funds have been loaded into the IDEA Consolidated E-Grants applications. If you are the fiscal agent (prime applicant) for the IDEA Consolidated application, please click on the following link to see if you have IDEA Part B and/or Preschool carryover funds <http://www.opi.mt.gov/pdf/speced/FY07IDEACarryover.pdf>.

If you, the fiscal agent for the application, have carryover, it will be necessary for you to create an amendment to your IDEA Consolidated application and allocate the total amount of your carryover into your budget(s) in accord with the appropriate purpose category(ies) and budget code(s).

Please note: *Members districts participating in the application **do not** have to take or complete any action in order for the fiscal agent to submit the application amendment.*

Procedures for IDEA Consolidated fiscal agents to follow to amend their applications to include Part B and or Preschool carryover.

1. Log in, using your user name and password into the E-Grants System: This needs to be either the Authorized Representative or the person with data entry rights.
2. Under Formula Grants, click on IDEA Consolidated.
If you are a district, select the radio button for the entity (e.g., Great Falls Elem.) that is the fiscal agent for the application. If you are a cooperative, click on the radio button for your cooperative application.
3. Click on Create Amendment.
4. Click on Open Application.
5. Click the Funding Tab: This will open up the Allocations page. You should see the funds for your legal entity in the "Carryover" row under "Prior Year Funds" located in the IDEAB and/or the IDEAPRESCHL Columns.

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6. To amend the Part B budget: On the top right hand side of the application page go to *Applications Sections* and click on the arrow:
 - Click on IDEA Part B
 - Click the "Page Lock Control" tab, then check the "Expand All" box. Next, check the Budget Detail box on the right-hand side of the page to open the page for editing . Save the page.
 - Click the Budget Pages tab.
 - Amend the Budget Detail page, using the appropriate purpose category(ies) and budget codes, to include all of the carryover amount. The amount you must build into the budget shows at the bottom of the page under "Allocation Remaining (A-H)."
 - Click on *Calculate Totals* and *Save Page*. Make certain the "Allocation Remaining" (A-H) field is zero.
7. To amend the Preschool budget: On the top right-hand side of the application page go to *Applications Sections* and click on the arrow.
 - Click on Preschool.
 - Follow the same instructions as stated above for amending and saving the budget.

To submit to the OPI

When the budget(s) has been amended and saved, the *authorized representative*, will need to go to the *IDEA Consolidated* section of the application and click on the *Submit* tab. When the Submit tab opens, click on *Consistency Check*, wait until it's completed, then go to the bottom of the page and click on *Submit to OPI*.

If a person set up as a data enter for E-Grants creates the amendment, he/she can also run the consistency check then click the "Submit for Local Review" button. This will notify the authorized representative that the amendment is ready for review. Once the AR is satisfied with the amendment, he/she will need to click on the Submit tab in order for it to actually submit to the OPI.

If you have questions regarding this memo, please call Marlene Wallis, Administrative Officer, at 444-2504. Questions regarding accounting should be directed to Charlotte McMilin, OPI Accounting, at 444-4403.